Oracle® Hospitality Inventory Management

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Preface

This guide describes how to use Inventory Management (myinventory) features and functionality. The content in this guide reflect the content the articles originally published on the MICROS Members or Wiki pages. It has the MICROS branding associated with the product for that release.

Audience

This document is intended for administrators and end users of the Enterprise Back Office Inventory Management (myinventory) module.

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at http://docs.oracle.com

Revision History

Date	Description of Change
September 15, 2015	• Initial publication.

1 Cost Centers

Creating and Configuring a Cost Center

1. Navigate to myinventory | Master Data | Cost Centers.
2. Select a cost center to configure or click **New** to create a new cost center.
3. Fill out the form as described in the following table:

Field	Description
Cost Center	Enter a name.
Number	This is the number that the cost center is identified by.
Account (Cost Center)	Applies to GL and A/P accounts. The cost center's account number is in the Accounts Payable System.
Assigned To	This is the parent level of the current cost center (location).
Default Main Store	This is the default store that the cost center receives goods from.
Taxes	Shows the types of taxes used at this cost center.
Closed at	Shows when the last period count was booked.
Close Cost Center/Store on Stock Take	Select this option to prevent users from editing or booking new documents in the closed period.
Exclude from Central Purchasing	Select this option to exclude this cost center or store from using central purchasing.
Using Transit	Select this option if a booked transfer has to be accepted of declined by the receiving store.
Warehouse	Select this option if this cost center or store is a warehouse.
Advanced Storage Location	Select this option if you want to allow Advanced Storage Locations to be used by this cost center.
Enable Production on Transfer	When this option is selected, the system allows production and transfer in a single step. When a production item is transferred, the system requests for the number of items to be produced for this transfer and increases the stock on hand accordingly.

Field	Description
Allow to use Production Module	If the option **Enable Production on Transfer** is enabled, this cost center can no longer be selected in the Production module. Select this option if you want the cost center to become available in the Production module again.
Use Sales Price for Transfer	Select this option if you want the cost center to use the sales price entered in *Master Data* | *Items* instead of the calculated cost price.
Automatic Yield	Select this option to activate the Automated Yield process. A Scheduler job ensures that items defined as Automatic Yield are 'exploded' in the ingredients defined in the Yield Container.
Type	Cost Center or Store. Cost center is selected by default.
Period Control	Defines the time the inventory should run for this cost center or store. If, for example, **Month** is selected, you cannot post transactions of the current month to the previous month. That is, all transactions must be posted at the end of the month. Only users with the access right **Booking in last Period Allowed** can book in previous periods. This function is only active if **Close Cost Center/Store on Stock Take** is *deselected*. None: The store is not closed until an inventory is performed. Year: Only posts till December 31st are allowed. Half Year: Only posts till June 31th and December 31st are allowed. Quarter: Only posts in the current quarter are allowed. Month: Only posts in the current month are allowed. Week: The start of the week is defined by the system. After the weekend, only posts in the current week are allowed.

Understanding Master Cost Centers

You can use the Menu Item Auto Link module to set a master cost center and assign

cost centers. By creating a master and assigning sub cost centers, you make linking menu items to inventory items or recipes more efficient as menu item linking performed on the master cost center can be copied to its sub cost centers by creating a Scheduler job. This eliminates the need to individually link menu items to similar cost centers.

Setting a Master Cost Center

1. Navigate to myinventory | Maintenance | Menu Item Auto Link.
2. Click **Create Master Cost Center**.
3. Click **New**.
4. Select the cost center that you want to be used as the master store.
5. Click **OK**.
6. Click **Save**.

Assigning Cost Centers to a Master Cost Center

1. Navigate to myinventory | Maintenance | Menu Item Auto Link.
2. Click **Assign Cost Center**.
3. Select a master cost center.
4. From the Source list, select a cost center
5. Click **Add ->>.**
6. Repeat steps 6-7 until you have all the cost centers that you want to assign to the selected master store in the Assigned list.
7. Click **Save**.

Copying Menu Item Links from a Master Cost Center to Assigned Cost Centers

1. Navigate to myinventory | Maintenance| Scheduler.
2. Click **Create Job**.
3. Select Menu Item AutoLink as the **Job Type**.
4. Click **OK**.
5. Select the **Start Date** and **Start Time** to run the job.
6. Select **Run once** if you want the job to run only once at the selected date and time.
7. Select **Periodically, every** and then enter a frequency if you want the job to run on a regular basis.
8. Click **Save**.

Deleting a Master Cost Center

1. Navigate to myinventory | Maintenance | Menu Item Auto Link.
2. Click **Master Cost Center**.
3. Select the master cost center you want to delete.
4. Click **Delete**.

2 Vendor Management

Understanding Vendor Price Variances

When you import an item catalog or an invoice, if there is a difference between the existing vendor purchase catalog and the vendor's price catalog (also known as Order Guide), you can update your catalog to the prices of the vendor. Alternatively, you can maintain the price quotes and reject the price variances.

Rejecting Price Variances

1. Navigate to **B2B Solutions**.
2. Choose the **Price Variances** link for the vendor you wish to work with.
3. Select the price variance(s) you want to reject.
4. Click **Reject Price Variance(s)**.

Defining Vendor Account Formats

1. Navigate to Maintenance | Settings | Vendor tab.
2. Type the format in **Vendor Account**. You can use the following indicators to define the Vendor Account format:

Supported Characters	Description
N	Denotes a number.
A	Denotes a character
?	Denotes a number or character.
-	Character separator.
/	Character separator.
.	Character separator.
;	Character separator.
|	Character separator.
:	Character separator.
_	Character separator.
#	Character separator.

When defining the Vendor Account format:

- The number of indicators must equal the number of characters in the Vendor Account.
- A maximum of 64 characters can be defined.

The following table provides examples of vendor account formats:

Vendor Account Format	Description and Example Vendor Account Number
NNNNNNNNNNNN	A 12 digit vendor account number. For example, `123456789123`

NNNNNNAAAAAA	A 12 character vendor account number. The first 6 characters should be digits while the last 6 should be characters. For example, `123456ABCDFG`
NNNNNN-AAAAAA	A 12 character vendor account number. The first 6 digits and the last 6 characters are separated by a dash. For example, `123456-ABCDEFG`
???? NNNNNNNN	A 12 character vendor account number. The first four characters can be either digits or letters but the last 8 characters should be digits. For example, `A12B34567890`

3 Recipes

Understanding Recipe Quantities

The **quantity** of a recipe is the portion of the recipe you want to request or transfer.

For example, if the recipe is for a cup of soup and a bowl of soup equals two cups of soup and you are requesting a bowl of soup, you should request two portions of the recipe.

Deleting Recipe Ingredients

1. Navigate to Recipes.
2. Select a recipe.
3. Select the ingredients that you want to delete.
4. Click **Delete Ingredients**.
5. Click **OK** to confirm the deletion.

4 Nutrient Management

Understanding Nutrient Catalogs

You can import two types of nutrient catalogs:

- A **Standard Catalog** is one that has been created by an agency, such as the U.S. Department of Agriculture (USDA).
- A **Custom Catalog** is a nutrient catalog that has been created externally, for example by an organization that contracted a third party to document the nutritional information for their menu offering.

Understanding Nutrient Catalog Licensing

Standard Catalogs offered by MICROS require you to obtain a license from the official distributor to use the information. The License Confirmation prompt is used to inform you of those nutrients. The prompt is shown when you attempt to import or use the licensed nutrients in an item or recipe.

The License Confirmation prompt is invoked at the following modules and is shown until the user confirms that a license has been obtained:

Module Name	Action Performed
Nutrient Catalog	When attempting to **Import Catalog** or **Update Catalog.**
Master Data | Items	Attempting to enter the Nutrient tab.
Recipes	Attempting to enter the Nutrient tab.
Maintenance | Settings	Attempting to enter the Nutrient tab.

Importing a Standard Catalog

1. Navigate to myinventory \| Maintenance \| Nutrient Catalog.
2. Select a Standard Catalog from the catalogs listed.
3. Click **Import Catalog**.
4. If you or your organization has obtained the license to use this catalog:
    a. Select the first check box and click **OK**.
    b. Once the import is complete, click **OK** when prompted.
5. If you or your organization does not have the license to use this catalog, select the second check box, and then click **Cancel**.

Importing a Custom Catalog

1. Navigate to myinventory \| Maintenance \| Nutrient Catalog.
2. Select **Custom Catalog**.
3. Click **Browse**, then navigate to and select the catalog from your local drive.
4. Click **Open** and then click **Import Catalog**.
5. Once the import is complete, click **OK** when prompted.

5 Ordering

Understanding the Delivery Date

The Delivery Date editor in the Ordering module is used to specify the date items are to be delivered. Only the current business date or any date in the future can be selected as the delivery date and you can define separate delivery dates for each different vendor in an order.

Configuring Orders to Accept Delivery Dates

1. Navigate to myinventory | Maintenance | Settings | Orders tab.
2. Select **Use Line Item Delivery Date**.

Defining Delivery Dates for Different Vendors Within an Order

1. Navigate to the Purchase Orders Detail page from any of the Ordering modules.
2. For each vendor:
   a. Select the check box next to the items belonging to the same vendor that you want to set the delivery date.
   b. Click **Set Dates**.
   c. Select a **Delivery Date**.
   d. Click **OK**.

Understanding the Central Ordering Module

The Central Ordering Module shows all B2B Orders and their progress. This enables you to see:

- What stores have placed orders.
- Which vendors have received the orders.

Viewing B2B Orders

1. Navigate to myinventory | Maintenance.
2. Click **Central Ordering**.
3. To filter the orders by delivery date:
   a. Select the **Order Date**.
   b. Click **Refresh**.
4. To filter the orders by vendor:
   a. Enter a vendor's name or click **Vendor** and select a vendor from the list.
   b. Click **Refresh**.

6 Inventory Management

Understanding Inventory Counts

You can create Inventory Counts through:

- Count Cycle
- List
- Blank Inventory
- Scheduling a job

Understanding Manual Inventory Date Selection

The inventory date cannot be changed once an inventory count it created. If you need to change the inventory date, you have to delete the existing inventory, recreate the inventory count with the new date and reenter the data.

Enforcing manual inventory date selection forces users to validate and select the correct date and reduces the chances of creating a count for an incorrect date.

You can use the manual inventory date selection to make the Date field mandatory and leaves it unpopulated for you to select. You cannot create an inventory count until a date is selected; the Create button is grayed out and only becomes active when a date is selected. Manual inventory date selection is enforced in the following modules:

- Inventory by Count Cycle
- Inventory by List
- Blank Inventory

Manual selection follows the following rules:

- You cannot select a backdate.
- Depending on the Count Cycle template you have chosen:
  - If you have selected **End of Month**, you cannot select a date in the middle of the month.
  - If you have selected **Daily/Weekly** and have for example only selected Wednesday, you cannot select any Monday.
  - If you have selected **Financial Period**, you cannot select a date outside of the selected financial period.

Enabling Manual Inventory Date Selection for an Organization

1. Navigate to myinventory | Maintenance | Settings | Inventory.
2. Select **Do not Populate Date in Inventory Counts by Default**.

Adding Items and Recipes using the Item Groups Detail or Storage Location Detail

1. Navigate to myinventory | Inventory | Suspended.
2. Select a document.
3. Click an **Item Group** to go to the Item Groups Detail page or click a **Location** to go to the Storage Location Detail page.

4. If you want to add items the inventory:
    a. Click **Add Item(s)/Unit(s).**
    c. Place the cursor in the **Item** field and press Enter.
    d. Select the item you want to add and click **OK**.
    e. If you want to add additional units:
        i. Place the cursor in the **Additional Unit field** and press Enter.
        ii. Select any additional units.
        iii. Click **OK**.
    f. Select a **Storage Location** if you are using Advanced Storage Locations.
    g. Click **OK** to complete the entry for this item.
    a. Click **Cancel** to exit the Add Item(s)/Unit(s) dialog box.
    b. Click **Refresh Count** to show the items you added in the Inventory Count Detail page.
5. If you want to add recipes to the inventory:
    a. Click **Add Recipe(s)**.
    b. Place the cursor in the **Recipe** field and press Enter.
    c. Select the recipe you want to add.
    d. Enter the **QTY**.
    e. Click **OK** to complete the entry for this recipe.
    f. Click **Cancel** to exit the Add Recipes dialog box.
    g. Click **Refresh Count** to show the ingredients of the recipes you added in the Inventory Count Detail page.
6. If you to save the inventory count for future use as a list:
    a. Click **Save as List**.
    b. Enter a name for the list.
    c. Click **OK**.

Understanding Menu Item Linking

It is through linking menu items that myinventory accurately depletes the stock-on-hand of inventory items. You can link one menu item to multiple inventory items or recipes.

That is, if an organization has a recipe that is sold multiple ways, you can link the menu item to different menu levels of that recipe.

For example, a restaurant sells French fries in two different sizes: small and large. The restaurant has created a recipe for French fries, but the recipe is only applicable for a small size. A large fries is equal to two small fries. By linking the recipes and knowing the ratio, myinventory determines that when a large fries is sold, two portions of the small fries recipe must be depleted in order to account for the sale.

Understanding Menu Item Linking with Negative Quantities

Instead of creating separate recipes for items with and without condiments, menu item linking allows you to use the same recipe created for adding the condiment but with a negative quantity.

For example, imagine you have a menu item for cheeseburger that is linked to the cheeseburger recipe. The cheeseburger recipe contains:

- 1 ea. patty
- 1 ea. bun
- 1 ea. slice cheese
- 1 oz. ketchup
- 1 oz. mustard
- 1 oz. onions

A server rings in:

- Cheeseburger NO Ketchup.

Since the recipe for cheeseburger depletes 1 oz. of ketchup, you need to add it back so that ketchup is not depleted. Therefore, you would link the No Ketchup modifier to the ketchup 1 oz. recipe with a negative 1 quantity.

Linking a menu item with a negative quantity

1. Navigate to **Menu Item Linking.**
2. Search for the menu item that you want to link (for example, No Ketchup).
3. From the search results, select the menu item by clicking the menu item hyperlink.
4. Click **Link Recipe**.
5. Select the recipe (for example, ketchup).
6. Click **OK.**
7. Enter **-1** for the **QTY.**
8. Click **OK.**

7 Inventory Transfer

Understanding Cost Center Areas

The Cost Center Areas module is where you determine which cost centers can transfer and request items from other cost centers.

For example, cost center A can transfer items to cost center B. But cost center B can only transfer and request items from cost center C.

Configuring Cost Centers to Transfer Inventory

1. Navigate to myinventory | Maintenance | Cost Center Areas.
2. Select a cost center.
3. Select **Transfer To**.
4. Click **Add Cost Centers**.
5. For each recipient cost center:
   a. Select a cost center.
   b. Select **With Sub Cost Center** if you want all cost centers below the selected cost center to have the ability to receive transfers from the default cost center.
   c. Select **Full Link** if you want the selected cost center to have the ability to receive items from the **Transfer To** cost center.
   For example, you want cost center A to have the ability to transfer items to cost center B and give cost center B the ability to receive items from cost center A.
   d. Click **Add**.

Configuring Cost Centers to Request Inventory

2. Navigate to myinventory | Maintenance | Cost Center Areas.
3. Select a cost center.
4. Select **Transfer From**.
5. Click **Add Cost Centers**.
6. For each cost center that can be queried with a request:
   a. Select a cost center.
   b. Select **With Sub Cost Center** if you want all cost centers below the selected cost center to have the ability to transfer items to the default cost center.
   c. Select Full Link if you want the selected cost center to have the ability to transfer items to the **Transfer From** cost center.
   d. For example, you want cost center A to have the ability to receive items from cost center B and give cost center B the ability to transfer items to cost center A.
   e. Click **Add**.

Creating a Transfer From Request

1. Navigate to Transfer From.
2. Enter the **Request From Cost Center**.
3. Select the date.
4. Enter any pertinent information in **Reference**.
5. Click **Create**.
6. Click the transfer document you just created to enter the Transfers Detail page.
7. If you want to add menu items to the transfer document:
    a. Click **Add Item(s).**
    b. Search for menu items using any of the filters.
    c. Select one or more menu items from the search result and click **OK.**
    d. Continue to add items or click **Cancel.**
    e. Enter the quantity you want to transfer of each item.
8. If you want to add recipes to the transfer document:
    a. Click **Add Recipe**.
    b. Enter the recipe name.
    c. If you want to view a list of all recipes in myinventory:
        i. Place the cursor in the **Recipe** field and press Enter.
        ii. Choose the recipe you want to transfer and click **OK**.
    b. Enter the quantity of portions of the recipe you want to transfer.
    c. Enter any additional information you want to be included with this recipe to appear in the transfer document in the Info field.
    d. Select **Round to Units** if you want the recipe to be rounded to its nearest base unit measurement when it is being delivered.
    e. Click **OK**.
    f. Continue to add recipes or click **Cancel**.
9. If you want to save the newly created list, click **Save**.
10. If you want to send the list to the relevant location, click **Book**.

Understanding Transfer From Using List

You can use the Transfer From Using List module to create a transfer request from a cost center using a previously created Transfer From list or an already existing list of products.

Creating a Transfer From Using List

1. Navigate to myinventory | Transfers |Transfer From Using List.
2. Select an existing document from the list.
3. Click **To Cost Center**.
4. Select a new cost center from the list and click OK.
5. Click **From Cost Center**
6. Select a new cost center from the list and click OK.
7. Select the **Date**.

8. Click **Create**.
9. From the Transfers From Detail page, modify the existing items or add new items and recipes.
11. If you want to save the newly created list, click **Save**.
12. If you want to send the list to the relevant location, click **Book**.

8 Inventory Analytics

Understanding the Forecast Out-of-Stock Module

The Forecast Out-of-Stock module predicts when inventory items run out based on the Calculation Method configured for an item or item group and the past sales of those items. The module forecasts item usage for the current business date and the next 13 days. If an item is out of stock, the count of that item shows as zero while those below zero are highlighted in red.

To predict future inventory usage, a Calculate Average Usage job must be created in the Scheduler.

Configuring the Calculate Average Usage Job

1. Navigate to myinventory | Maintenance |Scheduler.
2. Click **Create Job**.
3. Select **Calculate Average Usage as the Job Type** and click **OK**.
4. Select the **Start Date** and **Start Time** to run the job.
5. Select **Run once** if you want the job to run only once at the selected date and time.
6. Select **Periodically, every** and define the frequency if you want the job to run on a regular basis.
7. Select **Send E-Mail Notification** if you want an e-mail notification to be sent each time this job executes.
8. Select **Only if Job Fails** if you want notifications to be sent only if the job fails
9. Select **Job Owner** if you want the notifications sent only to you:
10. Select **Owner's Role** if you want the notifications sent to all users belonging to your role.
11. Select **Owner's Cost Center** if you want the notifications sent to all users in your cost center.

Viewing an Inventory Forecast

1. Navigate to myinventory | Forecast Out-of-Stock.
2. Select a cost center.
3. If you want to see the forecast for an Item Group:
   a. Click **Item Group**.
   b. Select an item group from the list.
   c. Click **OK**.
4. If you want to see the forecast for a particular item:
   a. Click **Item**.
   b. Select and item from the list.
   c. Click **OK**.
5. For the **Delivery Date**, select the date for which you want to see the forecast.
6. Select the necessary search filters:

a. Select **Out-of-Stock** if you only want to see out-of-stock items.
b. Select **Ignore Out of Stock** if you do not want to see out-of-stock items.
c. Select **Less than Minimum** if you only want to see items where the stock on hand is less than the minimum amount.
d. Select **Show also Inactive** if you want your search result to also include inactive items.
e. Select **Display Store Unit** if you want the item store unit to show.
f. Select **Display Base Unit** if you want the item base units to show.

7. Click **Refresh**.
8. Click **Export to Excel** if you want to export the search results.

9 Menus

Understanding Menu Groups

Menu Groups are essentially courses in a menu (for example, Starters, Main Course, Dessert, etc.). You can define up to 20 courses per menu group.

Enabling Menu Groups for an Organization

1. Navigate to myinventory | Maintenance | User Management.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Master Data**.
5. Under Menu Groups in Master Data/Function, select:
   - **Menu Groups**
   - **Save Menu Groups**

Creating a Menu Group

1. Navigate to myinventory | Master Data | Menu Groups.
2. Click **New**.
3. Enter a name for the Menu Group.
4. (Optional) Enter the Menu Group No.
5. Define the menu groups. For example, Starter, Soups, Main Course, etc.

Understanding Event Menu Planning

The **Event Menu Planning** feature allows you to:

- Plan future menus for your cost centers.
- Measure the planned, expected, and actual profitability of a menu.
- Determine what inventory items your cost center should be ordering.

Before creating an Event Menu Plan, you must create menu groups in the Menu Group module.

The following table describes the symbols and styles used by the Event Menu Planning page:

Symbols and Styles	Connotation
	The menu item is not linked to a recipe or an inventory item. No sales price, revenue, margin, and COS value are populated. That is, the values are shown as 0.00. Once the menu item is linked to a recipe or inventory item in Menu Item Linking, all values in Event Menu Planning update accordingly.
The menu item number (PLU) is red.	The menu item is inactive.

Configuring the Event Menu Plan Overview and Details Pages

1. Navigate to *myinventory* | *Maintenance* | *Settings* | *Event Menu Plan* tab.
2. You can configure the:
   - **Result Set Quantity** to define the maximum number of records that can be shown in the Event Menu Plan Overview page. You can configure the Event Menu Plan Overview page to show a maximum of 9999 records.
   - **Column Selection** filter to select which menu item attributes show on the Event Menu Planning Details page. By default, the page only shows the POS, Course, Menu Item Name, and QTY columns.
   - **Sort Method** to arrange the menu items:
     - Item Name: Sorts the menu items in alphabetical order.
     - Item Number: Sorts the menu items by their number.
     - Position: Sorts the menu items by their Point-of-Sale (POS) position.

Enabling Event Menu Planning for an Organization

1. Navigate to myinventory | Maintenance | User Management.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Production**.
5. Under Menu Planning in Production/Function, select:
   - **Event Menu Planning**
   - **Save Event Menu Plan**
   - **Add/Delete Items to an Event Menu Plan Document**

Enabling Menu Planning by List

1. Navigate to myinventory | Maintenance | User Management.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **System**.
5. Under List Management in System/Function, select:
   - **Menu Plan List**
   - **Add Menu Items to Menu Plan created from List**

Creating an Event Menu Plan

1. Navigate to myinventory | Event Menu Plan | Blank Event Menu Plan.
2. Select a **Cost Center**.
3. Select a **Menu Group**.
4. Enter the menu plan name.
5. In the **From date** editor, select the date this menu plan becomes active.
6. In the **To date** editor, select the date this menu plan becomes inactive.
7. Click **Create**.

Creating an Event Menu Plan in List Management

1. Navigate to myinventory | Maintenance | List Management.
2. Click **Create List**.
3. Enter the **List Name**, select **Event Menu Plan List**, and then click **OK**.
4. Enter the **Cost Center**.
5. (Optional) Enter a Reference.
6. Click **OK**.
7. Select **Corporate List** if you want to make this list available for all users.
8. Select **Locked List** if you want to lock this list.

Creating an Event Menu from an Existing List

1. Navigate to myinventory | Event Menu Planning | List.
2. Click **Refresh**.
3. Select an existing menu from the list.
4. Modify the event menu name, cost center, and menu active duration.
5. Click **Create**.

Adding Menu Items to an Event Menu Plan

1. In the Event Menu Planning Details page, click **Add Menu Item(s)**.
2. Select a **Menu Group**.
3. Search for menu items using the family group, menu item number, menu item name, recipe, or inventory item.
4. Click **Refresh** to show the search results.
5. Select one or more menu items and then click **OK**.
6. Click **Load Sales** to import the sales for the inserted menu items.
7. Click **Yes** to confirm and click **Save**.
8. Click **Save as List** if you want this menu to be saved for future use as a template or list.
9. Click **Suspend** if you want to save the menu and return to the Overview window.

Defining the Planned Quantity for Menu Items in an Event Menu Plan

1. In the Event Menu Planning Details page, for each item enter the planned quantity in the **QTY** column of the respective item.
2. Click **Calculate** to calculate the data and then click **Save**.
3. Click **Save as List** if you want this menu to be saved for future use as a template or list.
4. Click **Suspend** if you want to save the menu and return to the Overview window.

Changing the Menu Level for Menu Items in an Event Menu Plan

1. In the Event Menu Planning Detail page, select one or more menu items.
2. Click **Change Menu Level**.
3. Select a new menu level from the list.

4. Click **OK** and then click **Save**.
5. Click **Save as List** if you want this menu to be saved for future use as a template or list.
6. Click **Suspend** if you want to save the menu and return to the Overview window.

Deleting Menu Items from an Event Menu Plan

1. Navigate to myinventory | Menu Planning | Suspended.
2. Click **Refresh**.
3. Select a menu from the list.
4. In the Event Menu Planning Detail page, select one or more menu items.
5. Click **Delete Menu Item(s)** and then click **Save**.
6. Click **Save as List** if you want this menu to be saved for future use as a template or list.
7. Click **Suspend** if you want to save the menu and return to the Overview window.

Understanding Event Menu Item Classifications

Menu items are rated based on their popularity and contribution within each course. According to this rating, the items are classified into four types and styled as follows:

Menu Item Rating	Description	Color Code
HH	The item is both profitable and popular.	Green
HL	The item is high in popularity but low in profit.	Blue
LH	The item is low in popularity but high in profit.	Orange
LL	The item is both low in popularity and profit.	Red

Understanding Event Menu Item Popularity

The popularity of a menu item is calculated by the following formula:

```
Demand = Number of items sold of a particular menu item /
Total number of menu items sold.
```

If a menu item's sales percentage is greater than the average sales percentage for the entire menu, it receives a rating of H to indicate it has a higher sales percentage than the demand mix. If a menu item's sales percentage is lower than the average sales percentage for the entire menu, it receives a rating of L.

Understanding Event Menu Item Contribution

The contribution of a menu item is calculated by the following formula:

```
Contribution Margin = Menu price - Food cost
```

If a menu item's contribution is greater than the average contribution of the entire menu, it receives a rating of H to indicate that it has an above average contribution margin. If a menu item's contribution is lower than the average contribution of the entire menu, it receives a rating of L.

Viewing and Modifying Suspended Event Menu Plans

1. Navigate to myinventory | Menu Planning |Suspended.
2. Click **Refresh**.

3. Select a menu from the list.
4. You can make changes to the selected plan.

Printing Receipts for Linked Recipes and Items in an Event Menu

1. In the Event Menu Planning Details page, click **Print Receipts**.
2. Select a template using **Select Report**.
3. Click **OK**.

10 Jobs

Understanding Jobs

You can use the Job Logs feature to see the success and failure of jobs.

Calculating Average Usage

You can use the Calculate Average Usage job to calculate the average usage of inventory items. You must run the job daily if you are using Suggested Ordering.

1. Select **Maintenance** and then select **Scheduler**.
2. Click **Create Job**.
3. Select **Calculate Average Usage** from the **Job Type** drop-down list and click **OK**.
4. Select the **Start Date** and **Start Time**.
5. Select **Run once** if you want the job to run only once.
6. Select **Periodically, every** and define how often the job should run if you want the job to run on a regular basis.
7. If you want to receive a notification when the job executes:
   - Select **Send E-Mail Notification** if you want to receive a notification each time this job executes.
   - Select **Only if Job Fails** if you want notifications sent only if the job fails.
   - Select **Job Owner** if you want the notifications sent only to you.
   - Select **Owner's Role** if you want the notifications sent to all users belonging to your role.

Load Balancing

You can configure physical or virtual servers that host Oracle Hospitality Inventory Management to support load balancing. If a server fails, the other servers process the remaining active jobs.

When you configure load balancing, you configure each server to connect to the same master database. After you configure load balancing, you can use the Automation Service Activity Monitor to manage automation services and jobs on each server in the environment.

Configuring Servers for Load Balancing

1. Extract the file 150701_ASAMon 8.5.0.43.1559.zip.
2. If you are on a 32-bit server, copy the files in the `150701_ASAMon 8.5.0.43.1559\ASAMon.Application\32-bit Server` folder to another folder in your operating system. For example, `C:\ASAMon.`
3. If you are on a 64-bit sever, copy the files in the `150701_ASAMon 8.5.0.43.1559\ASAMon.Application\64-bit Server` folder to another folder in your operating system. For example, `C:\ASAMon.`
4. Copy the files in the `150701_ASAMon 8.5.0.43.1559\ ASAMon.Config` folder to the same folder that you copied the content of the 32-bit Server or 64-bit Server folder.
5. Open the `FMLOGIN.INI` file.
6. Enter the server name at all instances where the `DBLogin` parameter appears.

   For example,

   ```
   [BON]
   DBLogin=server name/BON/MICROS,BON,myinvenMenu.ini
   ```
7. Save the changes.
8. Open the `SQL.CONFIG` file and configure the `server name` and `ServiceName value` parameters as follows:

   ```
   <servers>
   <server name="Server name used in FMLOGIN.INI"<DbBrand
   value="SQLSERVER"/>
   <ServiceName value="Name of the Server Instance"/>
   </server>
   </servers>
   ```
9. Save the changes.

Monitoring Automation Service Instances and Jobs

Use the Automation Service Activity Monitor to view the performance and health of Automation Service instances in a load-balanced environment. The following table describes each tab in the utility.

Tab Name	Description
Current Activity	Shows the number of active jobs on each Automation Service instance and organization, details on active jobs on all instances and organizations; and event logs of all Automation Service instances. Currently active Automation Services instances are shown in green while others are shown in red.
Archive	Shows detailed information on executed jobs and workload of Automation Service instances. The Data secondary tab shows the information in a table. The Chart secondary tab shows the information graphically. The x-axis of the chart shows the date range and the y-axis shows the number of executed jobs per Automation Service instance or organization. Each instance or organization is represented by a different color.
Slow SQL	Shows jobs that took longer to execute than the configured threshold. By selecting a job from the center pane, you can view its SQL statement, SQL blind variables, SQL execution plan, and call stack. Use the information on this tab to identify slow running SQL statements for tuning the database or application servers.
Info and Exceptions	Shows additional information on executed jobs such as program errors, server messages, and database connection errors for troubleshooting.
Administration	Used to configure the Automation Service.

Managing Jobs in a Load-Balanced Environment

The following table summarizes how you can use the Automation Service Activity Monitor Utility to manage jobs in a load-balanced environment:

Action	Instructions
Activate or deactivate Automation Service instances.	To deactivate an instance, on the Current Activity tab, click **Deactivate.** To activate an instance, on the Current Activity tab, click **Activate.**
Temporarily exclude organizations from a job.	On the Current Activity tab, click **Exclude.**
Cancel active jobs.	On the Current Activity tab, click **Cancel** in the top left pane.
Check whether an active job is processing or on hold	On the Current Activity tab, select an active Automation Service instance and click **Ping** in the top left pane. If a job is still active, the Last DB Access column is populated with the date and time the database was last accessed.
Store log files of executed jobs locally	See Storing Job Logs Locally.
Export job data details shown in the Slow SQL tab	On the Slow SQL tab, **click Export.**
Export error information	On the Info and Exceptions tab, click **Export.**
Configure the Automation Service	See Configuring the Automation Service.
Purge database data	See Purging Database Data.

Configuring the Automation Service

You can configure automation services as described in the following table:

Field	Description
Max. concurrent jobs per Database Server	Defines the maximum number of concurrent jobs for all Automation Service instances per database instance. If only a single database server is used, then this defines the maximum number of jobs for all Automation Service instances. The default value is 40 jobs.
LOG SQLs with duration greater than (seconds)	Defines the time (in seconds) the system should wait before logging SQL statements. That is, any SQL statement that takes more than *n* seconds to execute is logged. The default value is 10 seconds.
LOG Execution Plan for SQLs with duration greater than (seconds)	Defines the time (in seconds) the system should wait before logging the Execution Plan for SQL statements that take longer to execute. That is, SQL statements that take longer than *n* seconds to execute are inspected against the Execution Plan. Define a value higher than **LOG SQLs with duration greater than (seconds).** The default value is 60 seconds.
Max size of LOG and Archive tables (rows)	Defines the maximum number of rows that can be stored in the Archive table for all organizations and Automation Service instances. Once the limit is reached, 30% of the oldest data is purged. The default value is 100 rows.
% Configuration of current running Internal Jobs	Defines the maximum percentage of internal jobs that can run concurrently for all Automation Service instances. The default value is 0.

Purging Database Data

1. On the Automation Service Activity Monitor, click the **Administration** tab.
2. Select a date and then click **Delete older than** to delete SQL data older than the selected date.
3. Repeat Step 2 to delete Archive data and Info and Exception data.

Storing Job Logs Locally

1. Click the **Archive** tab.
2. Select a job from the jobs listed in the center pane of the **Data** secondary tab.
3. In the File pane located in the lower right corner of the window, double-click the selected job's log file name to open its log file.
4. Click **Save.**

11 Visibility Criteria

Understanding Visibility Criteria

Visibility Criteria determines which cost centers have access to which items and information and which cost centers can physically view those items. Recipes, items, and lists are all subject to Visibility Criteria. Visibility Criteria can be categorized into district and concept.

Separating by districts gives cost centers the ability to provide items of regional cuisine. For example, a restaurant chain whose primary menu item is pizza determines that their customers in Hawaii enjoy pineapple and other exotic fruits on their pizza. The organization can set the Visibility Criteria to allow their Hawaiian cost centers the ability to select and view the pineapple menu item and not give other cost centers that option.

An organization can also separate by concept. For example, a very large organization owns a seafood restaurant, an Italian restaurant, and a BBQ restaurant. Using Visibility Criteria, the restaurant owner can limit the seafood restaurant to see only seafood menu items, the Italian restaurant to see Italian menu items, and the BBQ restaurant to see menu selections like ribs and pulled pork.

Configuring Item List Visibility

1. Click **Visibility**.
2. Select an **Assignment Group 1**.
3. Click **Assign->>**
4. Select an **Assignment Group 2**.
5. Click **Assign->>**
6. Select a **Cost Center**.
7. Click **Assign->>**

12 Mobile Solutions

Understanding Mobile Solutions 2010

Mobile Solutions 2010 is an application that enables you to handle the processing of inventories, create orders, receipts, and transfers using your hand held device (HHT).

Configuring Mobile Solutions to Interface with a Specific Organization

You must perform these steps when performing inventory management for an organization on a web service hosting multiple organizations:

1. In the Mobile Solutions application, select **Start**, and select **Configuration**.
2. Enter the password and login. This is the same password that is used to access hidden options in myinventory.
3. Select **Select Config File**.
4. Select **Application Data**.
5. Select **Materials Control Mobile Solutions**.
6. Open the config.xml file.
7. In the **Company** field, enter the short name for your organization.
8. Save the configuration.
9. Select **Start** and select **Materials Control**.
10. Enter your credentials and click **Sync Master Data**.

13 User Management

Filtering User Access by Cost Center

You can use the **C/S Filter** to determine and control user access by cost center and store:

1. Navigate to myinventory | Maintenance | User Management.
2. Select a user from the list.
3. Select **C/S Filter**.
7. Click the button next to the C/S Filter field.
8. Place the curser on the **Cost Center** field and press Enter.
9. Select one or more cost centers.
10. Click **Add**.
11. Click **OK** to exit the Add Cost Centers dialog box.

Configuring User Access to Cost Centers without using the C/S Filter

1. Navigate to myinventory| Maintenance | User Management.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Click the **System Module Group**.
5. Under List Management, select **Use Cost Center Relationships in List Management**. This option allows users to create, edit, and save Requisition and Transfer lists in the List Management module for cost centers that are not assigned to them in their C/S Filter. The **Request From** dropdown list shows the default cost center and all cost centers linked to the default cost center in the Cost Center Area module.

Configuring User Access to Cost Center Management

1. Navigate to myinventory | Maintenance | User Management.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Store**.
5. Under Transfers, select **Manage Cost Center Areas**.

Configuring User Access to Cost Center Areas for Transfers

Caution: Do not turn on the Use Cost Center Areas privilege until cost centers are set up. If this right is turned on prematurely, sites cannot perform any transfers.

1. Navigate to myinventory | Maintenance | User Management.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Store**.
5. Under Transfers, select **Use Cost Center Areas**.

Configuring User Access to the Central Ordering Module

1. Navigate to myinventory | Maintenance | User Management.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Purchase**.
5. Under Purchase Orders, select **Purchase Manager for prepared Orders**.

Configuring User Access to the Forecast Out of Stock Module

1. Navigate to myinventory | Maintenance | Settings.
2. On the General tab, select **Calculate Average Usage for All Items**.
3. Navigate to myinventory | Maintenance | User Management.
4. Select a user from the list.
5. Click **Manage User Right**.
6. Under Module Group, click **Purchase**.
7. Select **Out-of-Stock**.

Configuring User Access to the Transfer From List and Transfer To List Modules

1. Navigate to Navigate to myinventory | Maintenance | User Management.
2. Select a user from the list.
3. Click **Manage User Right**.
4. Under Module Group, click **Store**.
5. Under Transfers, select **Create Transfer From List** and **Create Transfer To List**.